

Johns Hopkins University

**FILLING TRAINING DEFICITS IN PROPOSALS (S2S) THROUGH PRE-
RECORDED INSTRUCTIONAL TUTORIAL VIDEOS**

by
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ABSTRACT

With the field of research administration being a large and ever-changing topic, it can be disorienting and frustrating for research administrators to be presented with new information or new processes, particularly without the appropriate tools and resources. This Capstone project aims to fill a gap or deficit in knowledge and understanding of the Cayuse-developed System-to-System (commonly referred to as S2S) program *Proposals (S2S)* for the pre-award staff at Texas A&M University Sponsored Research Services (SRS) through the production of pre-recorded tutorial videos. The author created two tutorial videos, less than ten minutes in length, which include step-by-step instructions for topics including importing subaward data and completing the prime application budget.

The first video entitled *Cayuse Proposals (S2S) - Import Subaward via Completed R&R Subaward Budget PDF* provides instruction on importing subaward data to the prime application by uploading a completed Research and Related (R&R) Subaward Budget PDF form. The second video entitled *Cayuse Proposals (S2S) – R&R Budget: Escalation/Replication and Manage Key Persons* provides instruction on completing the prime proposal R&R Budget form by utilizing the tools and functionality provided by Cayuse in Proposals (S2S).

These topics were determined to be those with the greatest unfamiliarity by polling the pre-award staff at SRS. The tutorial videos were made readily accessible to pre-award staff by utilizing YouTube for video publication, and the SRS website for organization of the collective links.

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GLOSSARY

Application Programming Interfaces (APIs) – A type of software interface that allows computers, systems, or other pieces of software to communicate with each other, passing data from one to the other.

Cayuse – A research administration solutions company providing software/program “suites” to support research administration functional areas.

Modular Application for the Electronic Submission and Tracking of Research Opportunities (MAESTRO) – The home-grown system of record utilized by Texas A&M University Sponsored Research Services (SRS) and other System Member research offices to route proposals for approval and manage current projects.

Proposals (S2S) – The System-to-System proposal submission “suite” provided by Cayuse purchased by Texas A&M University and utilized for Federal proposal submissions.

Research Information Services (RIS) – The group tasked to develop, implement, and maintain MAESTRO.

Sponsored Research Services (SRS) – The shared-services sponsored programs office responsible for proposal preparation and approval routing, contract negotiation and execution, and general project management and reporting.

Chapter 1. Introduction

1.1. Background.

In February of 2019, Texas A&M University (TAMU) purchased a System-to-System (S2S) proposal submission program from Cayuse, a company dealing in electronic research administration (eRA) modules. Cayuse offers a “build your own” approach to eRA, providing a number of “suites” or modules, each serving a different function such as proposal submission, project management, human subjects research compliance, vertebrate animals research compliance, and project management. As TAMU currently utilizes very established systems for compliance, conflict of interest, and project/account management, the University only required a proposal submission solution to minimize the administrative burden of accessing multiple federal sponsor portals to submit proposals, and to reduce submission errors and duplicative data entry, resulting in the purchase of the S2S module called Proposals (S2S). Figure 1: FY18 proposal submissions by sponsor type further demonstrates this need by reflecting the distribution of sponsor categories of submitted proposals in fiscal year 2018, with Federal sponsors making up nearly half (46%) of the total submissions for FY18.

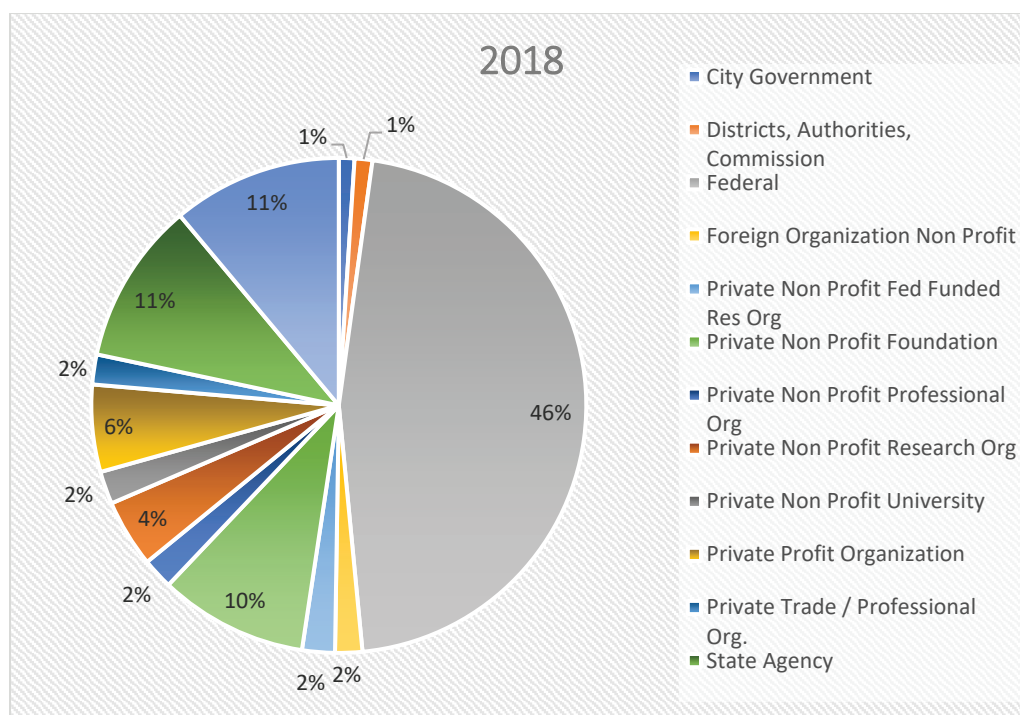


FIGURE 1: FY18 PROPOSAL SUBMISSIONS BY SPONSOR TYPE

Proposals (S2S) offered robust and real-time validations and allowed for the auto-population of organizational information previously manually entered for each proposal. When compared to other companies offering S2S programs, Cayuse and Proposals (S2S) provided the greatest capability and flexibility to integrate through application programming interfaces (APIs) with the current institutional system of record, Modular Application for the Electronic Submission and Tracking of Research Opportunities (MAESTRO). MAESTRO serves as the archive for the institution's proposal and project records, facilitates electronic approval routing, and manages billing, invoicing, and reporting for the life of awarded projects.

One of the goals of implementing Proposals (S2S) for the proposal preparation and submission processes was to reduce duplicative or repetitive efforts of the Proposal Administrators in the form of identical data entry for each proposal. By using institutional profiles in Proposals (S2S), data can be auto-populated in the appropriate forms and fields. This data includes institution information such as institution name, institution Data University Number System (DUNS) number, Tax ID number, institution address, and Federally approved Facility and Administration rates. Person profiles allow for the auto-population of personnel information for individuals such as the responsible Proposal Administrator (PA), Authorized Organization Representative (AOR), and Principal Investigator (PI) including address, phone number, and email address for each. All of this information was previously manually entered into each individual application. Auto-population of the information reduces time spent entering data and reducing the chance of error due to manual data entry. In addition to automatic data population, Cayuse also incorporates into Proposals (S2S) the capability to escalate and replicate costs across all project years, with standard escalation on items such as salary and graduate student tuition being pre-determined and set in the institution profile. This functionality results in a significant decrease in time spent transferring budget data and completing the budget form based on the finalization of the institutional budget template, used to prepare the budget according to institutional standards and policies.

Another objective of implementing Proposals (S2S) was to minimize discrepancies between submitted proposals and the MAESTRO record due to last minute changes or general mistakes in data entry. Through the APIs established between MAESTRO and Proposals (S2S), total budget amounts and documents are synced,

passing information to MAESTRO proposal record from the Proposals (S2S) application, eliminating discrepancies between data in MAESTRO and data in the submitted proposal.

To integrate Proposals (S2S) into the standard processes at SRS, a small group of administrators from SRS were teamed with programmers from Research Information Services (RIS), a department within SRS responsible for the maintenance and enhancement of MAESTRO. Cayuse provided a small team or Customer Support representatives responsible for ensuring that the Proposals (S2S) provided all of the functionality SRS needed by completing the original data dump of institution and personnel information, as well as developing the necessary APIs to ensure appropriate data syncing. The group of SRS representatives was led by a member of the SRS Executive Leadership Team responsible for coordination between the three major groups and general project oversight. Together the SRS and Cayuse representatives (collectively referred to as the Implementation Team), worked to integrate Proposals (S2S) with MAESTRO, ensuring that information and data passed between the two efficiently and accurately. Proposals (S2S) implementation included a thorough evaluation of current processes and practices, how they may be impacted, and how they may be adjusted to accommodate the addition of an S2S program. One of the most impacted processes was proposal approval routing and the format in which information is presented to institutional reviewers/approvers. This required reviewing exactly what information was most important for institutional review, and what information in what format could be produced by Proposals (S2S).

1.2. Statement of the Problem.

Once the implementation of Proposals (S2S) was complete, training of Proposal Administrators and faculty would be the next phase. Training in the use and navigation of Proposals (S2S) would occur in three parts:

1. “Train the Trainer”: one of the Cayuse representatives assisting with implementation made an in-person visit to the institution to train the four Team Leads responsible for training their individual team;

2. Team Leads hold training sessions for their respective teams in navigating between MAESTRO and Proposals (S2S), uploading documents, completing forms, the syncing process from Proposals (S2S) to MAESTRO, including notes and reminders for the Proposal Administrators to share with the faculty. The Team Leads followed a uniform agenda prepared by the Implementation Team to ensure consistent training across all four teams;

3. Proposal Administrators provide training to faculty and departmental staff on the navigation between MAESTRO and Proposals (S2S), document upload, and profile management/maintenance.

The individual Proposal Administrators would be responsible this final step of training for each of their assigned Departments, either by preparing reference documentation or personal visitation to the Departments to train in-person. While ensuring that the administrative staff felt confident and comfortable with Proposals (S2S),

as they are the primary users of Proposals (S2S), training the faculty was a nearly equally crucial step to ensure reception of the change in submission method remained positive, and provided added confidence in the Proposal Administrators handling their research proposals. This would not be a small task, with some Proposal Administrators responsible entire colleges due to activity level in proposal submission by department.

Training for Team Leads occurred November 6-7, 2019 following the agenda provided in Appendix A. Training was split between two days, 4 hours each day, to ensure Team Leads could be available to their staff the remainder of the day. Initial training of Proposal Administrators took place the week of November 11, 2019, with each Team Lead taking a full day during the week to train their respective teams. Training of the faculty was expected to begin in alignment with the first cycle of deadlines for the National Institute of Health (NIH)¹ in February of 2020 with continuing education and training for the Proposal Administrators as the expectations for the number of proposals submitted via Proposals (S2S) increased.

Unfortunately, previous turnover and the global COVID-19 pandemic bringing hiring freezes increased workloads and responsibilities for Team Leads as individuals began working remotely. Fortunately, exceptions could be requested regarding the hiring freeze, however, this effectively postponed continuing education for the Proposal Administrators, as Team Leads prioritized team management, workload balance, and training new staff members. This made it difficult to expect the Proposal Administrators to be able to provide efficient training to the faculty.

¹ "Standard Due Dates," NIH, accessed July 25, 2021, <https://grants.nih.gov/grants/how-to-apply-application-guide/due-dates-and-submission-policies/due-dates.htm>

After two full years since implementation, resources are still relatively limited due to shifting priorities; Proposal Administrators simply do not have the resources or knowledge of those resources available to plan and coordinate consistent and effective training, and some are still struggling with it themselves as a result of infrequent application, primarily due to departments submitting to non-Federal sponsors or the Federal sponsors they do submit to do not utilize Grants.gov for proposal submission. The general timing of the initial training around the back-to-back Thanksgiving and Winter Holiday season and the adjustment of priorities as offices around the world were sent home had a large part in this as well. This “deficit” is the ultimate problem to be addressed throughout the following case study.

1.3. Project Question.

- a) How will the developed tutorial videos on subaward data import and budget form completion assist Proposal Administrators in their day-to-day work, reduce the need for addition assistance and increase autonomous performance in proposal preparation and submission?

1.4. Project Objectives.

Through pre-recorded tutorial videos on importing subaward information and the completion of the R&R Budget form by optimizing tools and functionality available in Proposals (S2S), accessible and available on-demand, the overall objectives include:

- a) Addressing and resolving current knowledge deficits in the use of Proposals (S2S) and,

- b) Increased time efficiencies for leadership, particularly Team Leads and trainers, by reducing the number of questions received about Proposals (S2S).

As SRS re-establishes plans to carry out the third phase of training, it is imperative that the Proposal Administrators are confident and knowledgeable in Proposals (S2S) while also provided with consistent information about the processes and workflow. This is to ensure that information passed from the Proposal Administrators to the faculty in their respective departments is consistent and clear. Addressing the time efficiencies, providing an on-demand and online resource to the Proposal Administrators will greatly reduce the amount of time the Team Leads spend on in-person or one-on-one training, as well as reduce the number of frequently asked questions.

1.5. Significance.

The Texas A&M University System is comprised of 11 universities 8 state agencies², referred to as System Members, with SRS providing research administration services, from proposal preparation and submission to project closeout, to roughly half of the organizations within the System. Currently, SRS holds various trainings via Zoom on several topics, the most notable being institutional policies and procedures (AnSRS4U) and review sessions for the Certified Research Administrator (CRA) exam. These trainings recorded and made available on the SRS YouTube channel, and accessible via the SRS website³.

² "About," Texas A&M University System, accessed July 25, 2021, <https://www.tamug.edu/system/about/>

³ "Resources," Sponsored Research Services, accessed July 25, 2021, <https://srs.tamug.edu/resources/>

It is intended that Proposals (S2S) will be more greatly utilized for Federal proposal submissions, and yet the administrative staff do not appear to be confident using the program. This is observed through the author's daily interaction with the Proposal Administrators. To successfully move forward, on-demand resources must be made available for regular reference as well as initial training.

1.6. Exclusions and Limitations.

Although SRS is a shared service-provider, as distinct and individual entities, each of the System Members are nuanced in their policies and procedures, which SRS must abide by when it comes to preparing proposals and budgets. As such, there may be many different ways to accomplish the same task depending on the Member requesting the services. For the purposes of this project, and to maintain consistency as much as possible, the tutorial videos will not include member-specific information (e.g. effort requirements, cost share/IDC waiver approval, etc.), and will contain procedures that are the most widely practiced at SRS.

Chapter 2. Literature Review

2.1. Overview of literature review.

This Capstone Project focuses on providing an effective training and tutorial resource, increasing efficiencies in process management as well as time management and autonomy. Though the studies completed on virtual training and its benefits have been primarily in the private business and health care sectors, the concepts are transferrable to many other applications, including training and continuing education in research administration. This is also evidenced by the many other Institutes of Higher Education (IHEs) that have implemented online recorded tutorial videos relating not only to Cayuse usage, but general institutional procedures as well.

2.2. Details of review.

The primary question during this project is centered in the idea of efficiency and efficacy: how will the pre-recorded tutorial videos increase efficiency in time management and productivity for Proposal Administrators and Team Leads and increase knowledge base and autonomy for Proposal Administrators? In a dissertation presented by Reid entitled *A Qualitative Study of the Effectiveness of Corporate Virtual Training Design and Business*, the author focuses on virtual training in sales-based industry environment⁴. The author evaluates employee perception as well as the methods of virtual training available, what is perceived as the best, and what is the most time and cost efficient. Reid examined qualitative data on effectiveness of training strategies

⁴ Omar Reid, "A Qualitative Study of the Effectiveness of Corporate Virtual Training Design and Business" (PhD diss. Capella University, 2019). ProQuest Dissertations & Theses Global.

including eLearning, Virtual Instructor-led Training (VILT), and other distance learning methods as well as the perception from employees and managers. The author chose to draw the sample from a high-performing sales company and narrowed the scope and sample size to a single high-performing region while still maintaining a national representative sample. Reid's sample selection requirement included training participation, and the author collected qualitative data through interviews with employees, noting personal data such as gender, ethnicity, education level, and job level. Reid concluded through qualitative analysis of the sample interview responses that VILT appeared to be the most effective and well-received/preferred method of virtual training by employees, though managers considered VILT inefficient in cost and time. Non-instructor led eLearning, generally defined as "learning conducted through some source of electronic media," appeared to be the next best alternative to VILT.⁵

2.3. Applicability of literature review.

The literature reviewed provides general support in the efficacy of virtual training formats and opportunities by evaluating and analyzing qualitative responses from individuals who have participated in virtual training environments. The literature also makes the distinction between virtual training opportunities as instructor-led and non-instructor-led, and addresses which format offers the greatest efficiency as well as efficacy. This comparison is important to the project question, as it seeks to address time management efficiencies as well efficacy of process training and information sharing.

⁵ Ibid.. 22

Chapter 3. Need(s) Assessment

3.1. Need(s) Assessment.

After software implementation of Proposals (S2S), training was to take place in three steps:

- 1) A Cayuse representative involved in the implementation process of Proposals (S2S) would provide training to the Proposal Administration Team Leads;
- 2) Team Leads provide training to the Proposal Administrators respective to their teams; and,
- 3) Administrators provide training to the faculty.

Step 1 was completed in July of 2019, and was quickly followed by Step 2 in November 2019. The holiday season that followed the initial training of the Proposal Administrators did not allow for application of the knowledge gained, and in turn, necessitated follow up or refresher training before Administrators could complete the faculty outreach step. The COVID-19 pandemic forced the adjustment of priorities, and training for Proposals (S2S) was postponed allowing Team Leads to focus on the management of now completely remote teams and adjusting general Proposal Administration training to accommodate new hires starting completely remote.

3.1.1 Assessment of Need.

As one of the SRS representatives during the implementation of Proposals (S2S), a Team Lead, and member of the Proposal Administration Training Team, the author is

exceedingly familiar with Proposals (S2S) and processes and workflow internal to SRS. The assessment of need was made primarily based on the author's professional experience as a subject matter expert in the navigation and use of the system. Multiple questions are received a week including requests for demos regarding the utilization of Proposals (S2S), and while questions are expected, it can be time consuming to answer the same questions and for Proposal Administrators to ask the question. There is an additional difficulty in setting aside the appropriate time to prepare, organize, and carry out comprehensive training. There are currently no readily available tutorials, documents, or demos for Proposal Administrators to reference should there be questions or concerns. The most reliable and available options for guidance are the staff involved in the initial implementation process. Without readily available resources to reference besides an individual, there is a sense of autonomy that is missing for the individual to be able to problem solve, think critically, and utilize additional resources to find an answer or learn a process.

3.2. Metrics.

Official office-wide implementation began in alignment with the NIH Cycle 1 standard deadlines (February-March 2020). Shortly after the end of the Cycle 1 deadlines, submission of proposals via Proposals (S2S) was expanded to all Grants.gov opportunities except for the National Science Foundation (NSF) and the National Aeronautics and Space Administration (NASA) proposals due to form requirements and general limitations. During the initial implementation phase, out of the total NIH proposals submitted, roughly 75% of proposals were submitted via Proposals (S2S).

During the second implementation phase (including all Grants.gov proposal submissions), the proportion of proposals submitted via Proposals (S2S), out of Federal submissions only, dropped to approximately 33%. This was possibly due to several factors including submission requirements such as the utilization of the eXCHANGE proposals submission portals for the Department of Energy Advanced Research Projects Agency – Energy (ARPA-E) and Office of Energy Efficiency and Renewable Energy (EERE), Principal Investigator reluctance or hesitancy, and general unfamiliarity with Proposals (S2S) on the part of the Proposal Administrators due to a lack of training. While the submission requirements of the individual agencies cannot be controlled, reception and familiarity can be controlled. As Proposal Administration teams transition to utilizing Proposals (S2S) for NSF and NASA submissions and initiating outreach to faculty, ensuring that all users are knowledgeable and comfortable navigating and utilizing Proposals (S2S) to maximize the efficiencies it offers is vital.

3.3. Sources.

The proposed project was discussed with the representative from the SRS Executive Leadership Team and was approved by the Executive Director. A poll was created to determine the topics that were the most critical to have tutorial videos for. The poll included a list of relevant topics related to Proposals (S2S) processes and asked respondents to rank the topics in order of training most-necessary to training least-necessary and included a free-text field to provide any additional comments or suggestions. The poll was distributed to all Proposal Administrators, optional to complete, and anonymous. After two weeks, the author evaluated the results and determined the most necessary tutorial topics: 1) Import of subrecipient information, and

2) R&R Budget completion. Figure 2: Proposals (S2S) Topic Poll Results below summarizes the polling results.

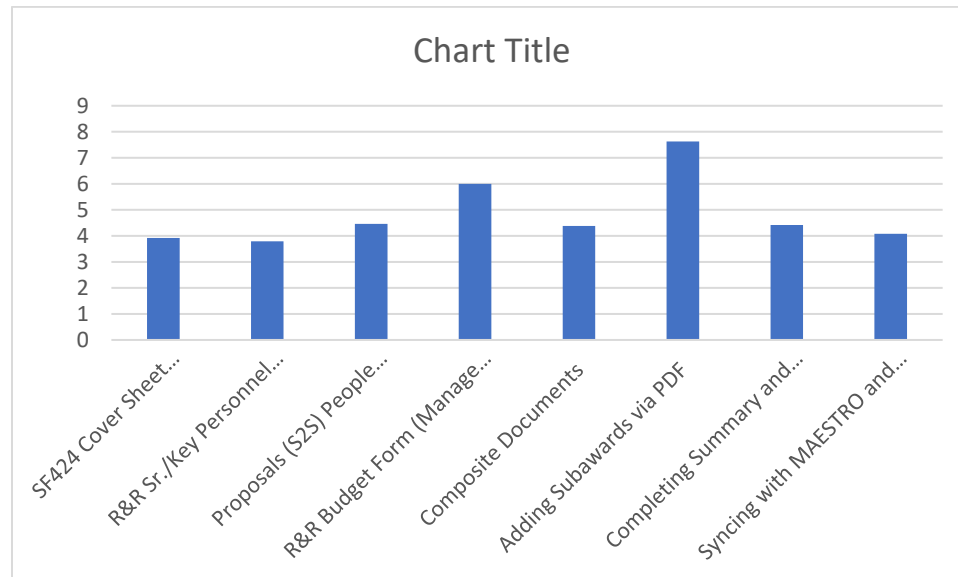


FIGURE 2: PROPOSALS (S2S) TOPIC POLL RESULTS

Chapter 4: Project Description

4.1. Discussion of project elements.

The objective of this Capstone Project is to provide administrative staff with a more readily accessible resource for completing grant applications in Proposals (S2S). There is a perceived lack of confidence in proposal submission, primarily due to an unfamiliarity with Proposals (S2S) and exacerbated by a lack of tutorial or reference documentation, and regular follow up training. This resource takes the form of two pre-recorded video tutorials, less than ten minutes in length, and available on the SRS YouTube channel. The videos can be accessed through the YouTube channel directly, or through an organized table of contents and hyperlinks on the SRS website resources page⁶. Being available through YouTube allows the tutorials to be available at any time on any device with an internet connection, increasing the accessibility of the reference material.

Import Subaward via R&R Subaward Budget PDF and R&R Budget Preparation provides step-by-step demonstrations with voiceover descriptions, explaining each step of each process. The voiceover also makes a point to note specific areas that require greater attention to detail or have an additional caveat to consider when completing the forms or importing data such as manually entering the fringe benefit amounts because the Texas A&M University System does not utilize a standard, flat rate to calculate fringe benefits. These tutorial videos are meant to serve simultaneously as a regular reference material for seasoned Proposal Administrators and as a training tool for incoming Proposal

⁶ "Resources," Sponsored Research Services, accessed July 25, 2021, <https://srs.tamu.edu/resources/>

Administrators either new to the field or simply new to Proposals (S2S) and how SRS utilizes it. This in turn standardizes training in these specific topics, reduces discrepancies within training, and minimizes the frustrations of the Proposal Administrators when completing these forms or processes.

Chapter 5. Methodology

5.1. Methodology Overview.

There is a concept in any field to not “recreate the wheel”; if a process exists, and works, one does not need to start from scratch. Instead, utilize the resources already available. SRS currently holds regular training sessions of all research administration topics in a series called AnSRS4U. The topics range from budget development to subaward monitoring, and are recorded, edited to include captions, and published on the SRS YouTube channel. With this, the foundation to create and publish tutorial videos already exists. The *Resources* page on the SRS website is dedicated to archiving recorded trainings and other information. For Proposals (S2S) tutorial videos, the only major difference from the current videos available is in the design: pre-recorded videos instead of recorded real-time presentations.

5.2. Project Design and Discussion.

To ensure the processes and workflow are appropriately captured, necessary sample documentation needed to be prepared. The following documents were prepared for *Import Subaward via R&R Subaward Budget PDF*:

1. Complete R&R Subaward Budget
2. Budget Justification – Tutorial State University
3. Complete R&R Senior/Key Person Profile
4. Complete Project/Performance Site Location(s)
5. Biographical Sketch – Jane Smith

The forms and documents were completed using all stand-in information for the DUNS number, place of performance address, and investigator contact information.

Comparatively, the documents necessary for *R&R Budget Preparation* were few; the only document needed for this process was a sample budget justification.

The author utilized Camtasia from TechSmith for all screen capture and voice recording, as well as editing and file export to YouTube. With all of the sample documentation prepared, the next task was relatively simple: complete the process in the training instance of Proposals (S2S) as if a real proposal. The steps had to be moderately slowed down to ensure enough time for voiceover explanation. The recording was then reviewed, and any fumbles or longer-than-necessary sections were cut to ensure the visual is as smooth and concise as possible, and under 10 minutes.

With the completed visual recordings, the author was able to describe and explain the processes as a voiceover recording. The audio was recorded in this manner as opposed to in real-time during the screen recording because of the ability to do multiple takes without interrupting the process flow in the visual part of the tutorial. Using this method, the author was able to follow along with the screen recording explaining, and rewind in the event of a mistake, all in a single recording file. The media file is then added as a separate track on top of the screen recording. With the visual track locked for editing, the author could edit the voiceover to align with the screen recording by removing multiple takes of the same explanation or cutting long pauses in the audio.

The tutorial videos, now edited and ready for publishing, are exported via Camtasia to MP4 files to be uploaded and publicly published on the SRS YouTube

channel. It takes a little bit of time to upload, as YouTube does a bit of work in the background compressing and formatting the file as needed for the platform. Once completed formatted and uploaded, the videos can be edited further if needed using YouTube's online editing program. At this stage, all that is needed are subtitles for closed captioning. While this can be completed in Camtasia as well, utilizing the functionality in YouTube allows for more accurate aligning of the captions with the appropriate time-markers. Providing subtitles in the tutorials allows for even greater accessibility for those perhaps hard of hearing, or viewing the video where audio is not an option (i.e. a public setting such as a conference or in an open-office environment).

Chapter 6. Project Results and Discussion

6.1. Project Result 1: Tutorial Videos

The project resulted in the publishing of two tutorial videos, less than ten minutes in length, entitled *Import Subaward via R&R Subaward Budget PDF* and *R&R Budget Preparation* on the SRS YouTube channel. These tutorial videos provide instruction for importing subaward data/information into a prime grant proposal for submission and completing the R&R Budget form in the prime grant proposal for submission (emphasis on escalation and replication), both complete with subtitles and transcripts. The author worked directly with the SRS website maintenance team to add a resource-topic subheading in the Resources page of the website. Hyperlinks to the resulting products are provided on that Resources page under the subheading “Cayuse Proposals (S2S).”⁷ The videos are accessible to anyone at any time, providing brief Proposals (S2S) process tutorials.

⁷ “Resources,” Sponsored Research Services, accessed July 25, 2021, <https://srs.tamu.edu/resources/>

Chapter 7. Recommendations and Discussion

7.1. Introduction

The use of pre-recorded video tutorials as a training tool can provide a consistent training method on various topics in research administration, preventing discrepancies in training content, improving on time management, and increasing confidence and autonomy in research administrators in day-to-day activity. Through the work completed in this Capstone project, the author makes the below recommendations related to the resulting products.

7.2. Recommendations to Sponsored Research Services for resource materials related to Cayuse Proposals (S2S).

7.2.1. Recommendation 1: The Sponsored Research Services Proposal Administration Training Team should incorporate the tutorial videos into the standard training agenda for use by newly hired Proposal Administrators.

The Proposal Administrator training agenda utilized for the training and onboarding of newly hired administrators includes training on Cayuse Proposals (S2S) beginning in week 5 of the 6-week training schedule alongside training on individual common federal funding agencies. The two videos prepared in this project should be incorporated in the content of the training agenda for this topic as a consistent method of process training. Part of the training agenda includes opportunities for individual practice outside of normal training sessions. The training team may determine it best to assign the videos as part of those independent practice opportunities or as part of the training

sessions for the new staff to follow along in real time and pause for any questions or concerns.

7.2.2. Recommendation 2: Sponsored Research Services should provide quarterly updates to faculty and staff through interactive Zoom presentations, preparing agenda items through surveys completed beforehand, and record presentations/Q&A for future reference.

To ensure that all Proposals (S2S) users are up-to-date on any changes to processes or any software changes, the author recommends that SRS hold quarterly informational sessions via Zoom video conferencing. These sessions should include any Proposals (S2S) product updates and provide a Q&A to address any concerns or questions provided by faculty and staff, including departmental and research administrators. The sessions may also include demonstrations or additional information on topics of concern as determined through quarterly surveys. This will serve as a real-time training opportunity for those requiring additional guidance. Sessions should be recorded and archived on the SRS Resources webpage under “Cayuse Proposals (S2S)” for future reference.

7.2.3. Recommendation 3: Sponsored Research Services should facilitate the expansion of the Cayuse Proposals (S2S) Video Tutorial Series by assigning an individual or team to create videos for those topics determined as needed but not addressed in this Capstone project.

As is evident by the original polling results in Figure 2, there are many topics of concern for Proposal Administrators (and faculty) including the maintenance of

professional profiles, and internal SRS processes such as the completion of the Proposal Summary section and generation of proposal routing package for approval. SRS should facilitate the creation of a team or the assignment of an individual to expand on the Cayuse Proposals (S2S) Video Tutorial Series to include tutorial videos on these additional topics. Surveys should be conducted biannually to ensure topics of concern are being covered.

7.2.4. Recommendation 4: Sponsored Research Services should collect data reflecting the efficacy of the tutorial videos through the use of surveys and feedback using Google Forms and by analyzing viewing data provided by YouTube.

There are many tools available widely to collect and analyze data including RedCap, Google Forms, and other free services such as Survey Monkey. Google Forms is a program readily available to TAMU and SRS, and is a versatile and flexible method by which to collect survey and free-text feedback responses. Additionally, YouTube provides data and analytics including number of views and which parts of each video is most frequently viewed or re-viewed. The results of these surveys and the metrics provided by YouTube may inform the team responsible for expanding the video tutorial series on viewership, efficacy, and future tutorial topics.

Chapter 8: Conclusion

Cayuse Proposals (S2S) and other System-to-System submission programs are an exceptional tool for proposal preparation and submission. Their validation protocols are robust, and their autofill features save an abundant amount of time during the proposal preparation process. The integration of Proposals (S2S) with the institution's system of record, MAESTRO, means a greater reduction in duplicative efforts and discrepancies between internal records and submitted documents.

The problem identified in this project is that the administrative staff have not received sufficient training or resources to feel confident in the program, and therefore perhaps lack confidence in their work. Incorporating a significant programmatic change without sufficient training can lead to discontent in the workplace, frustration, and turnover. There is an additional institutional return on investment factor. If the program is not being utilized to its greatest potential, there is a low return on investment, and a regression occurs. The time and effort gone into implementing and integrating this program is for naught.

BIBLIOGRAPHY

1. Reid, Omar, "A qualitative study of the effectiveness of corporate virtual training design and business" PhD diss., Capella University, 2019. ProQuest Dissertations & Theses Global.

Appendix A: Cayuse Proposals (S2S) Training Agenda

Cayuse Proposals (S2S) Training (Train the Trainer)

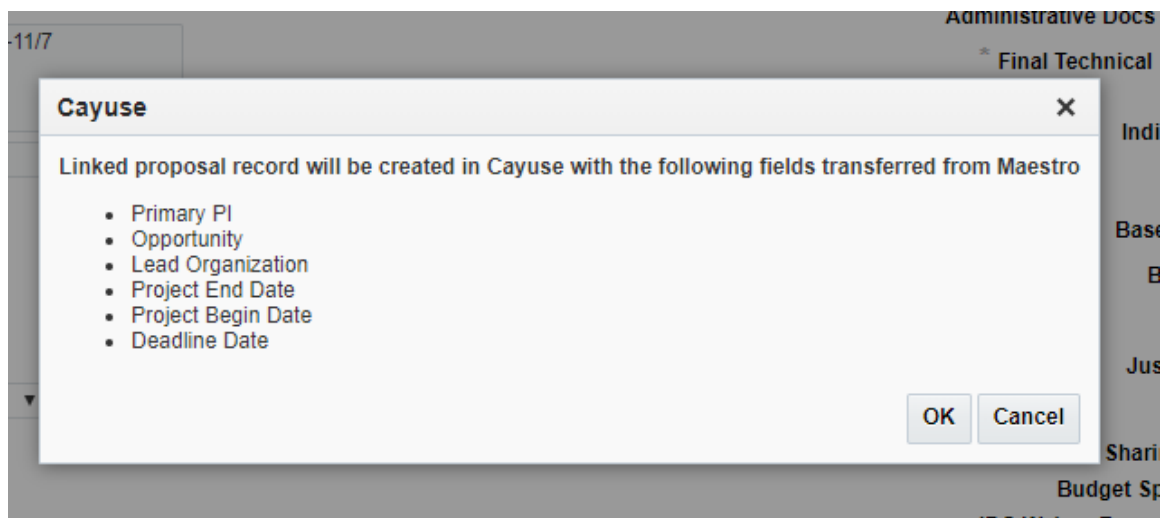
Wednesday, November 6th 1:30-4:30:

Training Topics:	<ul style="list-style-type: none">● Proposal creation (use opportunity ID PA-EN-R01)<ul style="list-style-type: none">○ MAESTRO<ul style="list-style-type: none">▪ Required information for log in▪ Information transferred to Proposals (S2S) upon initiation (pop-up box)○ Review auto-filled information and data needed● Navigation between MAESTRO and Cayuse Proposals (S2S)<ul style="list-style-type: none">○ “Open” and “Log Out”● Access delegation <p>*Note that Proposals (S2S) log in is SSO/UIN</p> <ul style="list-style-type: none">● Budget<ul style="list-style-type: none">○ Manage Personnel○ Replication and escalation● Rolling validations● Things to keep in mind<ul style="list-style-type: none">○ Project dates, while automatically entered, are not automatically set up through the proposal. Can do this in the first page of the Cover Page○ Manage Key Persons is first viewed in RR Key Persons○ RR Budget and Modular budget are not automatically checked as “Required” (same as ASSIST)○ Estimated program income is required; enter 0 if none● Managing a professional profile<ul style="list-style-type: none">○ Uploading biosketch○ Updating contact information
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Maestro Training URL: <https://maestrotrain.ris.tamu.edu>

Thursday, November 7th 1:30-4:30:

Training Topics:	<ul style="list-style-type: none">● Cayuse to MAESTRO sync<ul style="list-style-type: none">○ Reference MAESTRO prepared doc on what syncs from S2S to MAESTRO● Routing package prep<ul style="list-style-type: none">○ Contents○ Process● QC Process<ul style="list-style-type: none">○ QC performed in S2S● Submission● Subs<ul style="list-style-type: none">○ Subawards.com○ Export .cayuse file for import○ Print file to PDF<ul style="list-style-type: none">▪ Address those that send to a central office
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Appendix B: Tutorial Video Products

Tutorial Video #1: Cayuse Proposals (S2S) - Import Subaward via R&R Subaward Budget PDF

Tutorial Video #2: Cayuse Proposals (S2S) - R&R Budget Preparation

Appendix C: Short Bio

Lyndal Arceneaux received a Bachelor of Science in Wildlife and Fisheries Sciences from Texas A&M University. She is a Senior Proposal Administrator II and Team Lead in Pre-award Services at Sponsored Research Services, specializing in proposal preparation and submission. She has been with SRS for just over six years, having started in the role of Proposal Administrator I. She now supervises a small team of very talented Proposal Administrators, enjoys the challenges that she faces every day. SRS being a shared-service research administration office, Lyndal has had the opportunity to learn from countless colleagues in areas such as Contract Negotiation and Project Management, and has learned even more in her pursuit of a Master of Science in Research Administration from Johns Hopkins.